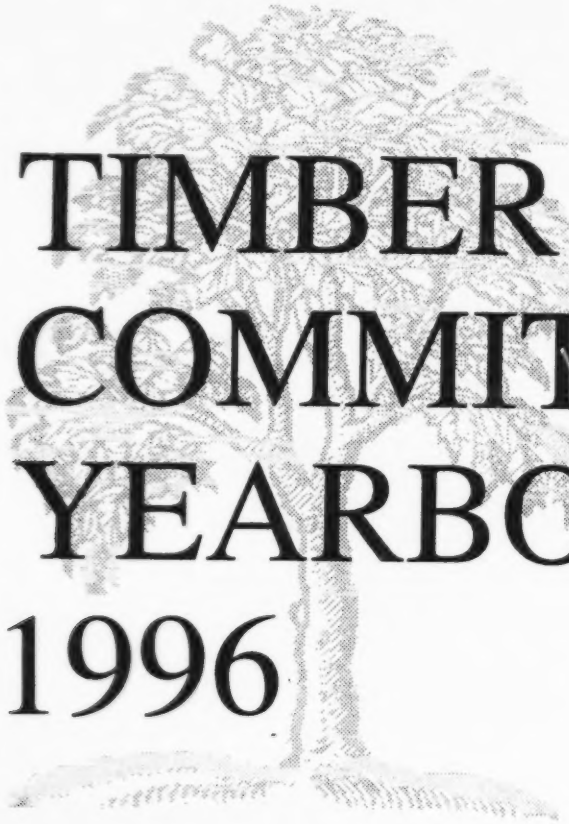
United Nations
Economic Commission for Europe

Food and Agriculture Organization
of the United Nations

ECE/TIM/INF/3



TIMBER COMMITTEE YEARBOOK 1996

UNITED NATIONS

ECE/TIM/INF/3

United Nations Economic Commission for Europe
Food and Agriculture Organization
of the United Nations

Timber Section,
Geneva, Switzerland

UN-ECE TIMBER COMMITTEE YEARBOOK

1996

UNITED NATIONS
New York and Geneva, 1996

NOTE

Symbols of United Nations documents are composed of capital letters combined with figures. Mention of such a symbol indicates a reference to a United Nations document.

* *

The designations employed and the presentation of the material of this publication do not imply the expression of any opinion whatsoever on the part of the secretariat of the United Nations concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries.

ABSTRACT

The UN-ECE Timber Committee Yearbook 1996 contains an overview on the Committee's activities and bibliographical references for its publications. The Committee's activities include broadly: contributing to follow-up to UNCED and the Helsinki Ministerial Conference for the Protection of Forests in Europe; its annual session as well as those of subsidiary bodies and teams of specialists; collection and analysis of statistics on forest products, forest products markets and forest resources; promotion of sustainable forestry; and, assistance to countries in transition in central and eastern Europe.

ECE/TIM/INF/3

UN-ECE TIMBER COMMITTEE YEARBOOK 1996

Table of contents

Page

Preface iv

I. THE TIMBER COMMITTEE'S ACTIVITIES IN 1995:

1. Timber Committee activities contributing to the follow-up of UNCED and the Helsinki Ministerial Conference on the Protection of Forests in Europe 1

2. Forest products markets 1

3. Assistance to countries in transition in central and eastern Europe 2

   - Workshops organized in 1995

     * Forest seed collection, treatment and storage 4
     * Marketing of sawnwood products in countries in transition to market economies ... 5

4. Fifth European Timber Trends and Prospects Study (ETTS V) 5

5. Exploring multiple use and ecosystem management: from policy to operational practice 8

6. Forest Economics and Statistics 8

7. Public relations in the forest and forest industries sector 9

8. Development of new products, recycling, markets and applications for forest products 9

9. Timber Committee/European Forestry Commission study tour in the United States on the hardwood resource and its utilization 9

10. Forest fires 10

II. ACTIVITIES PLANNED FOR 1996 AND 1997 11

III. BIBLIOGRAPHICAL REFERENCES 15

IV. LIST OF MEETINGS IN 1996 AND 1997 18

Some facts about the Timber Committee 20
UN-ECE/FAO Timber Section publications 21

PREFACE

The *Yearbook* is intended to disseminate the information on the Timber Committee's activities among those for whom it would be most useful - experts in the fields under consideration. The aim is twofold: to provide an overview of the Committee's activities; and to provide bibliographical references, so that interested experts may obtain the necessary documents as quickly and easily as possible. The *Yearbook* can not be an exhaustive account of all the Committee's activities, which are set out in the Committee's formal report and associated documents.

Following the recommendations from readers and users as well as the *Ad Hoc* Meeting to improve the collection and dissemination of statistics (report: TIM/EFC/WP.2/AC.4/2, 16 March 1993), the Timber Committee publications (other than reports and associated documents) have been organized since 1994, into the following five series:

Timber Bulletin	ECE/TIM/BULL/.../...
Timber and Forest Study Papers	ECE/TIM/SP/...
Timber and Forest Discussion Papers	ECE/TIM/DP/...
Timber and Forest Information Series	ECE/TIM/INF/...
Timber and Forest Seminar and Workshop Proceedings	none

The Committee publishes the *Timber Bulletin*, which provides regularly, detailed information on the forest products sector: statistics on production, removals, trade (total and by origin and destination); prices; the results of an annual survey on forest fires; analyses of market developments and prospects for the coming year. The contents of the *Timber Bulletin* in 1996 are set out in page 11.

The **Timber and Forest Study Papers**, formerly publications in the ECE/TIM series, are composed of the Forest and Forest Products Country Profiles, Forest Resource Assessment publications, medium-term surveys of the structure and capacity of the wood-based panels and sawmilling industries, and other special studies. The **Timber and Forest Discussion Papers** are intended to be a means of distributing current topical information in the forest and forest industries sector which might or might not become part of a more comprehensive study at some later time. Unlike the *Timber Bulletin* and the **Study Papers**, the **Discussion Papers** have limited input from the secretariat and are published in their original language. **Timber and Forest Seminar and Workshop Proceedings** are not published by the secretariat, but by the host country of such activities, this explains why there is no identification code. The last series is the **Timber and Forest Information Series** which consists of this *Timber Committee Yearbook*, plus *Facts about ...*, which presents background information and activities of the Committee and its two subsidiary bodies. A complete list of publications appears at the back of this *Yearbook*.

Publications' covers and title pages have been changed, and their format standardized. Now each publication includes an abstract, some facts about the Timber Committee and a list of the year's publications. Realizing that the distribution of publications is critical to their effective utilization, the secretariat has updated its mailing list and efforts are being made to also include forestry and forest products institutions. The secretariat views these improvements as an ongoing process and readers are invited to suggest additional modifications.

Information about the publications or any other aspect of the Committee's work may be obtained by writing to the secretariat:

Timber Section
UN-ECE Trade Division
Palais des Nations
CH - 1211 GENEVA 10
Switzerland
Fax: + 41 22 917 0041

I. THE TIMBER COMMITTEE'S ACTIVITIES IN 1995:

1. Timber Committee activities contributing to the follow-up of UNCED and the Helsinki Ministerial Conference on the Protection of Forests in Europe

In 1993, the Committee, with the European Forestry Commission, attached the highest priority to contributing, within its mandate and geographical coverage, to these political processes concerned with promoting the sustainable development of the forest sector.

First the Committee, through its secretariat, has participated in and contributed to a number of meetings, notably those concerning criteria and indicators of sustainable forest management, of both the Helsinki and Montreal "processes". A major concern has been to make these meetings aware of what information is already being collected internationally to avoid duplication, improve comparability and reduce the reporting burden on countries.

The secretariat has also received a direct mandate from the Helsinki process to act as international coordinator of the implementation of resolution H3 on forestry assistance to countries in transition. The main activity in this respect has been the collection of information from all countries of forestry assistance, bilateral and multilateral, thus monitoring the level and type of activity. A first report was presented to the Antalya meeting of the Helsinki process in January 1995. The second survey is being carried out in early 1996 and being installed in a database to enable more detailed analysis.

However, probably the most important contribution of the Committee to these political processes is that it makes a significant contribution to the information "infrastructure" necessary for international discussion of complex issues. Practically all parts of its programme are relevant to questions of sustainable forest management, in that it provides data, analysis or technical information which is of use to policy makers. Particularly relevant are the timber trends studies, and the forest resource assessment, as well as the regular statistical monitoring and analysis published in the *Timber Bulletin*.

---

2. Forest products markets

Market developments in 1995 and prospects for 1996

Forest products markets weaken in 1995 after strong recoveries in 1994 -- trends vary for 1996

At the annual UN/ECE Timber Committee discussion of forest products markets, the Committee noted that the gains of 1994 had given way to reduced apparent consumption of forest products in 1995 in all 3 regions of the ECE: Europe, North America and the former USSR. The outlook for 1996 is uncertain and varies by product and region.

At the 1994 session, the Timber Committee had forecast improving markets, but in November 1995, because of reduced construction in North America, the United Kingdom and Germany, as brought on by a slowdown in economic growth in North America and western Europe, consumption of sawn softwood was forecast to fall in 1995. Consumption of wood-based panel products, especially OSB (oriented strand board) and MDF (medium density fibreboard), however, are forecast to grow strongly.

Much of the strength behind the forest products markets in late 1994 and early 1995 came from the pulp and paper sector. Strong demand for newsprint and writing paper led to record high prices for pulp. Pulpwood responded by rising in price and alternative raw materials for pulp, i.e., chips, residues and recycled paper, hit record levels also. In general sawnwood, both softwood and hardwood, followed this trend and rose in price in 1994 and early 1995, but then fell as demand slowed and stocks were full.

Predictions of lower interest rates for 1996 could stimulate some residential construction, and indeed North American consumption of sawnwood is forecast to regain 1994 levels, but remain well below levels of the 1980s. However in Europe, consumption of sawn softwood is forecast to fall again in 1996, while sawn hardwood is forecast to continue to rise. Although plywood consumption is forecast to fall in Europe and especially in North America in 1996, largely due to substitution by lower-priced OSB, other engineered wood products are rising in utilization. Production of both OSB and MDF is expanding rapidly worldwide and market analysts wonder if demand will keep pace with the volumes offered. Pulp, paper and paperboard demand are forecast to remain strong in 1996 and thus the demand for pulpwood, which is also an important furnish for some wood-based panels, is predicted to rise.

In eastern Europe, output growth has exceeded western Europe and North America in 1994 and the predicted continued growth in 1995 and 1996 would have positive effects on forest products markets. However, overall Russian output fell 4% in 1994, and by even more in some forest products sectors. Roundwood harvesting has become unprofitable in many areas, mainly due to increasing transport costs, while most other forest products sectors, with the exception of pulp production and export, have become less profitable. While total sawn softwood exports fell from 1991 to 1994 by 39%, exports to destinations outside the CIS rose 13% as forest products trade within the CIS collapsed. Forecasts for Russian consumption, production and trade of most forest products in 1996 are for increases from the low 1995 levels.

Finally, the Committee considered efforts should be made to develop forest products markets in order to that the level of utilization of European forests could better achieve its biological potential. Promotion of wood in all its applications as well as diversification of markets are seen as an important part of the sector's management.

---

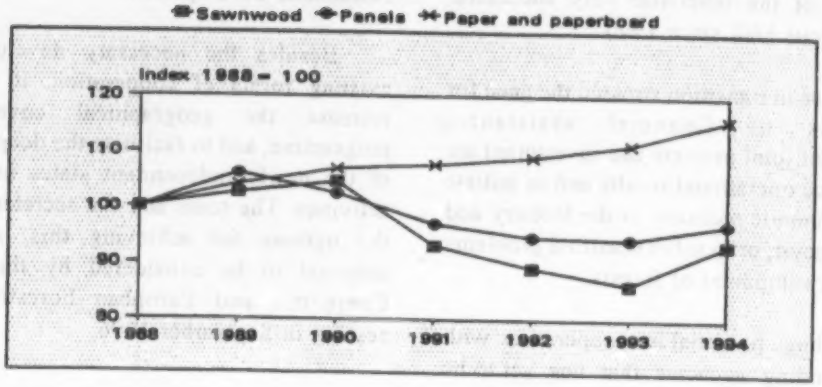
3. Assistance to countries in transition in central and eastern Europe

The Helsinki Ministerial Conference in 1993, when adopting Resolution H3 "Forestry Cooperation with countries with economies in transition", gave a new impetus to the assistance provided to the central and eastern European countries. The Timber Section was asked to act as international coordinator of the above resolution, and the Timber Committee, jointly with the European Forestry Commission set up a team of specialists. The team recommended to monitor the activities under H3, and the first survey was carried out in 1994. This survey revealed that activities for countries in transition require more coordination and transparency, and that active cooperation between the transition countries and clear identification of target areas and forms of assistance is essential. The second round of the inventory was started in 1995.

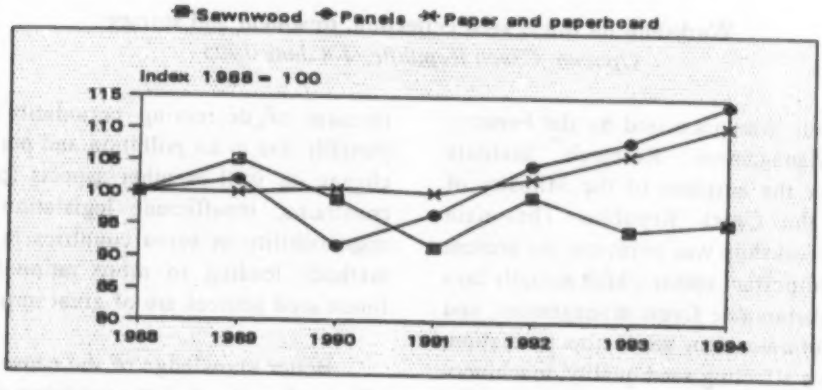
The evaluation of the 1995 replies has not been finished at the time of writing, but some conclusion can already be drawn. The three priority areas identified by the team of specialists in 1994, namely institution building, development of market oriented enterprises and protection of forests in general, remain of the highest importance. Restitution of forest land, and its consequences for forestry legislation, administration, and sustainable forest management are the focus of attention in all transition countries. Despite the considerable efforts made in developing forest policies, establishing new institutional frameworks and building new capacities, this process is still in a premature state and countries reached very different levels of development.

Apparent consumption of sawnwood, panels and paper & paperboard 1988-1994

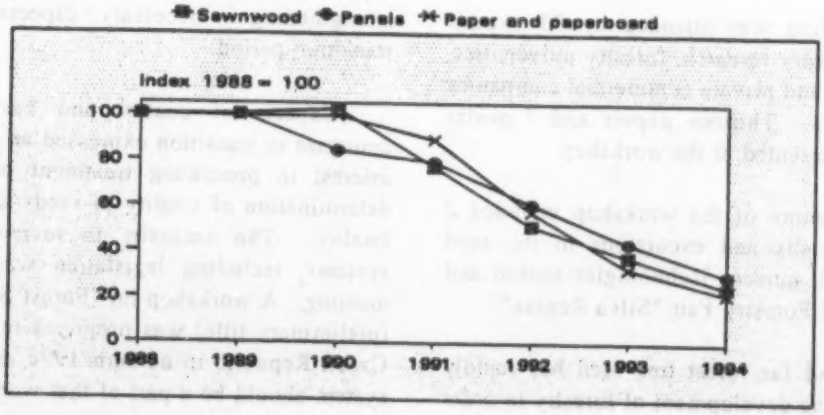
Europe



North America



Former USSR



Exchange of information and transfer of knowledge through workshops, seminars and study tours are considered some of the most important ways of assistance. This demand-driven form of cooperation can be successful only if it is based on clear identification of needs and strong commitment to follow-up actions. This latter field is felt to be the weak point of the otherwise very successful series of workshops held since 1990.

The countries in transition stressed the need for various forms of financial assistance. Implementation of joint projects and investment are needed to produce operational results and to initiate or accelerate economic recovery in the forestry and forest industry sector, or to solve manifold problems of sustainable development of forests.

There is a huge potential for cooperation with international funding agencies that has yet to be exploited. The reason for the relatively low level of forestry's involvement in this type of projects is that forestry is not recognised as a high priority area in the transition countries. Therefore, extremely thorough preparation and management of project proposals is required, and international assistance is needed to highlight the role of forestry in sustainable development.

Besides the necessary development of the existing forms of cooperation, it is essential to increase the geographical coverage of the programme, and to facilitate the deeper involvement of the newly independent states in international activities. The team and the secretariat will review the options for achieving this, and develop a proposal to be considered by the joint Timber Committee and European Forestry Commission session in September 1996.

Workshop on forest seed collection, treatment and storage
Opocno, Czech Republic, 4-8 June 1995

The workshop was organized by the Forestry and Game Management Research Institute (VULHM), under the auspices of the Ministry of Agriculture of the Czech Republic. The main objective of the workshop was to review the present situation in this important sector which actually lays the ground for sustainable forest management, and to exchange information on seed crop prediction, production factors affecting seed quality, machinery and equipment used in seed collection, processing, seed storing, forest seed testing, presowing and sowing treatment and trends in the sector.

The workshop was attended by 33 experts representing forestry research, forestry universities, state enterprises and private commercial companies from 8 countries. Thirteen papers and 7 poster sessions were presented at the workshop.

The programme of the workshop included 2 days of field visits and excursions to the seed production plant, nursery technologies station and the International Forestry Fair "Silva Regina".

The demand for forest tree seed has rapidly increased with the development of forestry in order to cover reforestation and afforestation programmes. Because of decreasing periodicity of seed-years, partially due to air pollution and perhaps to climate change, as well as other aspects (pests, economic constrains, insufficient legislation and lack of responsibility in some countries in transition), all methods leading to more rational utilization of forest seed sources are of great importance.

Better knowledge of the causes of seed years, effects of pre-treatment conditions and storage, new methods for conservation of gene-sources, and more intensive research in this areas are needed. The support of institution building and capacity strengthening is necessary, especially during the transition period.

Experts of central and eastern European countries in transition expressed an especially high interest in presowing treatment of forest seeds, determination of vitality of seeds and testing seed quality. The necessity to review seed control systems, including legislation was noted at the meeting. A workshop on "Forest Seed Pathology" (preliminary title) was proposed to be held in the Czech Republic in autumn 1996 and seed control system should be a part of that workshop.

Workshop on marketing of sawnwood products in countries in transition to market economies
Tartu, Estonia, 9-13 October 1995

The aim of the workshop was to sensitize leaders in industry, education and trade associations from countries in transition (CITs) to the marketing of forest products using sawnwood as an example (the first, in what might become a series, was held in Sopron, Hungary in 1994). The workshop was attended by participants from Belarus, Estonia, Latvia, Lithuania and the Russian Federation. It was held under the auspices of the Timber Committee and hosted and sponsored by the Estonian Ministry of Environment, Forest Department and Luua College of Forestry in cooperation with the Finnish Ministry of Agriculture and Forestry and the FAO Forestry Department.

Broad topics covered included the marketing and business environment, the marketing function and its relation to other sawmilling functions, efficient marketing of sawnwood products, marketing information systems and marketing training for CITs. This last subject was developed as an important link between the workshop and the potential users of the marketing information back in the countries. Case studies investigated a range of successful and unsuccessful marketing examples in CITs.

Two field trips were made to a variety of private and state-owned forest products producing enterprises in both Latvia and Estonia. In Latvia the participants visited a furniture company, a joint German-Latvian venture sawmill and then heard presentations on export marketing of Latvian sawnwood and development of the forest and forest industry sector in Latvia during the transition period. In Estonia the participants viewed a new sawmill as well as an established mill which had a value-added operation building modular homes. The Estonian tour wound up at Luua College which is partially financed through the operations of two portable sawmills which are equally used for instruction purposes.

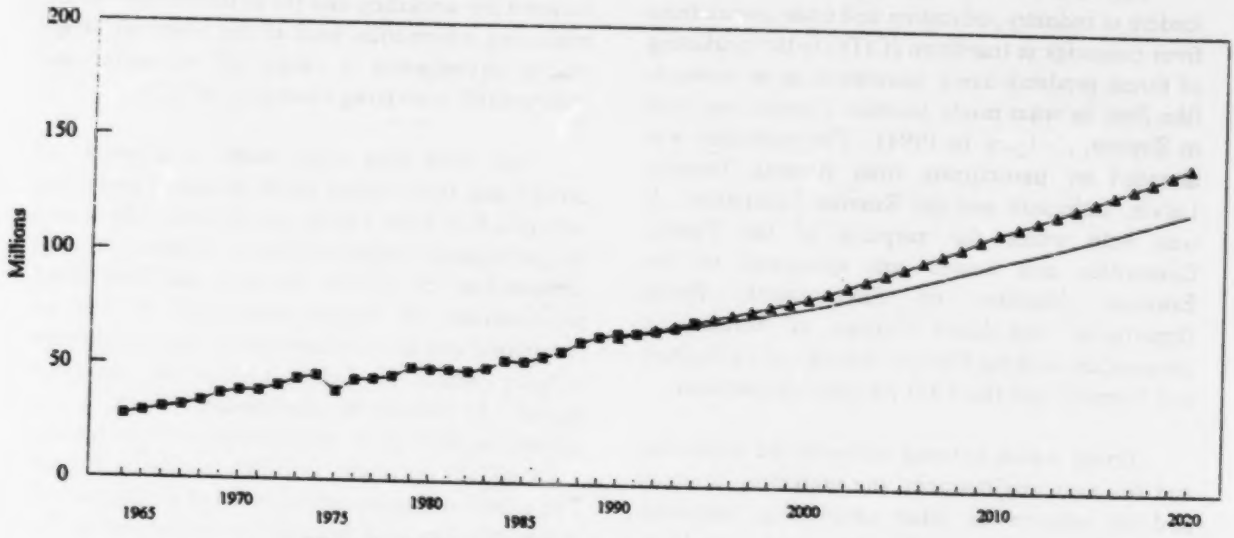
---

4. Fifth European Timber Trends and Prospects Study (ETTS V)

About every ten years, the Committee, with the FAO European Forestry Commission, carries out a major cooperative study of the long term outlook for the forest and forest products sector in Europe. The first such study was published in 1953. The fifth will be published in spring 1996, rather later than planned, because of staff shortages in the secretariat. The study reviews the outlook for demand for forest products, supply of roundwood and the balance between the two. This necessitates consideration of the outlook for European removals, consumption, production and trade of forest products as well as recycling, use of energy wood and prices of forest products. Above all, it considers the interaction between the above. There are two base scenarios and a number of alternative scenarios, with national data at 10 year intervals to 2020. ETTS V will be accompanied by a number of working papers with detailed data. The joint session of the Committee with the EFC in September 1996 will discuss the implications of ETTS V for policy.

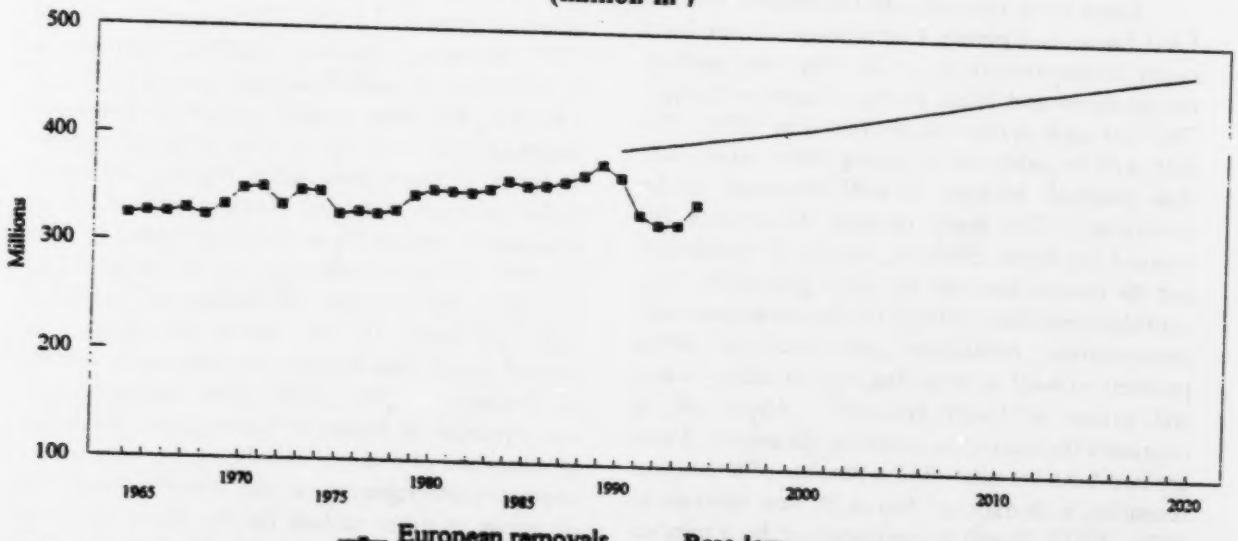
The base scenarios of ETTS V, assuming economic growth of 1.8% to 2.8% p.a. to 2005 and 1.5% thereafter, foresee moderate growth in consumption of sawnwood and panels (0.8% to 1.8% p.a.) and rather steadier growth for paper and paperboard (2.1% to 2.6%), with increased imports of forest products from other regions and much higher recovery rates of waste paper, which is expected to reach 48% in 2020, compared to 37% in 1990. European removals are also expected to rise, from 390 to about 480 million m^3, which is still well below the net annual increment. In general, supply and demand are expected to remain in balance. The study also explores the consequences of higher or lower prices for forest products and of changes in policies, for instance on energy or environment, as the direct influence of decisions in other sectors on the forest sector is explicitly recognised and analysed.

Scenarios for European paper consumption
(million m.t.)



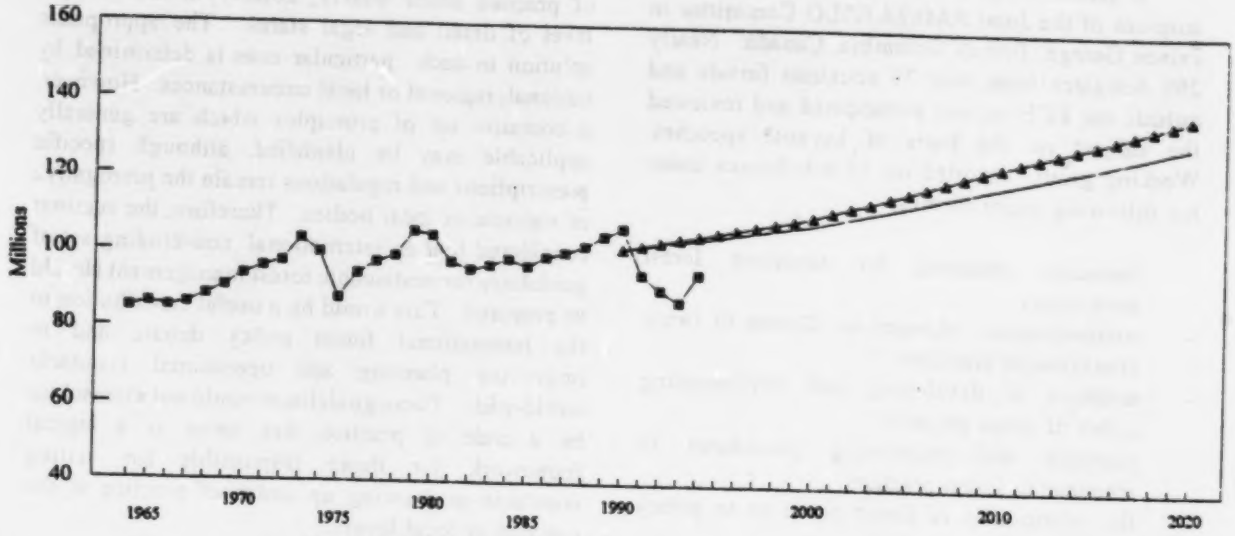
Baltic countries not included in historical series

European removals
(million m^3)



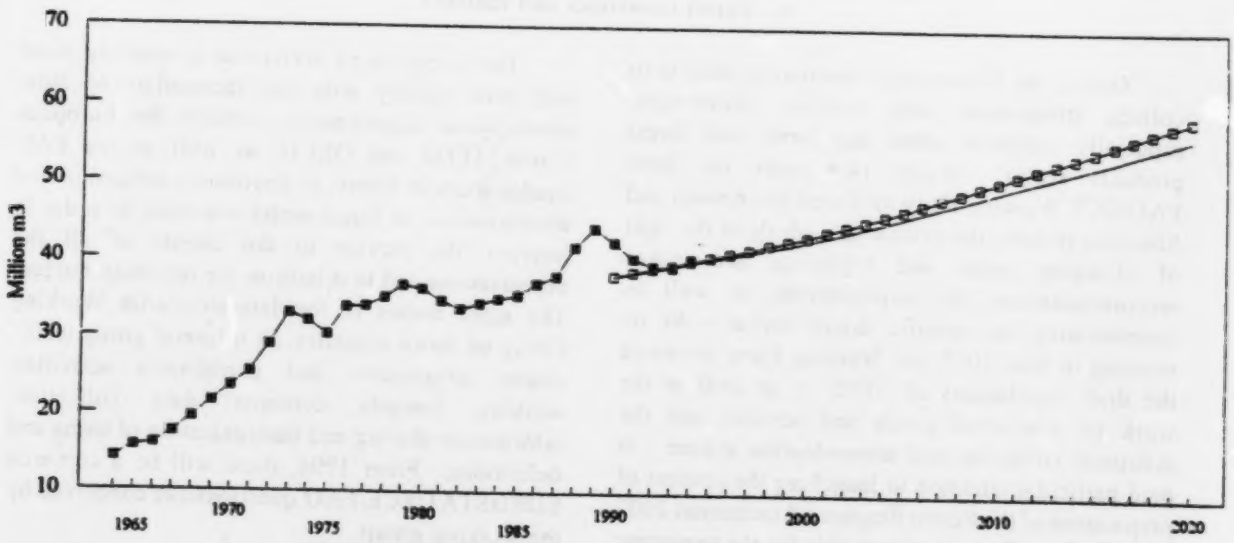
Baltic countries not included in historic series

Scenarios for European sawnwood consumption
(million m³)



Baltic countries not included in historic series

Scenarios for European consumption of wood based panels



Baltic countries not included in historical series
Veneer sheets included in historical series, but not in projections (approx. 2 million m3 in 1990)

5. Exploring multiple use and ecosystem management: from policy to operational practice

A seminar was held on this topic, under the auspices of the Joint FAO/ECE/ILO Committee in Prince George, British Columbia, Canada. Nearly 200 delegates from over 30 countries (inside and outside the ECE region) participated and reviewed the subject on the basis of keynote speeches. Working groups reported on 15 sub-themes under the following major themes:

- landscape planning for sustained forest ecosystems;
- socio-economic changes in relation to forest management practices;
- methods of developing and implementing codes of forest practice;
- planning and monitoring procedures in response to forest practice;
- the relationship of forest practices to policy and science.

In its conclusions, the seminar noted that codes of practice differ widely, notably in their scope, level of detail and legal status. The appropriate solution in each particular case is determined by national, regional or local circumstances. However, a common set of principles which are generally applicable may be identified, although specific prescriptions and regulations remain the prerogative of national or local bodies. Therefore, the seminar considered that an international, non-binding set of guidelines for sustainable forest management should be prepared. This would be a useful contribution to the international forest policy debate and to improving planning and operational standards world-wide. These guidelines would not themselves be a code of practice, but serve as a logical framework for those responsible for setting standards or drawing up codes of practice at the national or local level.

This recommendation will be submitted to the Joint Committee in June 1996.

---

6. Forest economics and statistics

One of the Committee's continuing tasks is to collect, disseminate and analyse information, especially statistics, about the forest and forest products sector. Every two years the Joint FAO/ECE Working Party on Forest Economics and Statistics reviews the system as a whole in the light of changing needs and capacities and makes recommendations for improvement, as well as concentrating on specific major topics. At its meeting in June 1995, the Working Party reviewed the draft conclusions of ETTS V, as well as the work on non-wood goods and services and the statistical collection and dissemination system It paid particular attention to launching the process of preparation of the Forest Resource Assessment 2000 (the Working Party is responsible for the temperate and boreal part of the assessment).

The Committee's secretariat is working more and more closely with the secretariats of other international organisations, notably the European Union, ITTO and OECD, as well as the FAO headquarters in Rome, to coordinate collection and dissemination of forest sector statistics, in order to improve the service to the clients of all the organisations and to minimise the reporting burden. The main means is the Intersecretariat Working Group on forest statistics, an informal group which shares information and coordinates activities, working towards common data collection, information sharing and harmonisation of terms and definitions. From 1996, there will be a common EUROSTAT/ECE/FAO questionnaire conceived by the working group.

---

7. Public relations (PR) in the forest and forest industries sector

The Joint ECE Timber Committee (TC) and FAO European Forestry Commission (EFC) Team of Public Relations Specialists in the Forest and Forest Industries Sector held its third meeting in Beaupré, Québec, Canada, in June 1995. The Team formulated the following recommendations which were presented at the November 1995 Timber Committee Session:

Communications Network - It was strongly suggested that each country establish a publicity/public relations coordinator to be a part of the Team's network.

Promotion of Wood - It was recommended that the Timber Committee uses its leadership to encourage international sponsorship and increase co-operative effort on an international level.

Priority public relations - The Timber Committee and the European Forestry Commission should establish the main messages about forests and the forest industry that they wish to promote in order to help individual national public relations officers and other communicators to give priority in their work.

Training of foresters - Communications skills should be included in the formal training programme for forestry students.

Forestry video - The Team recommends that a forestry video competition be organized in time for their fiftieth anniversary in 1997.

International communications - The Team recommends that forestry institutions use Internet electronic-mail for communications and supply information to a forestry database for access by the public.

Countries in transition - The Team agreed to assist in the preparation and organization of a PR workshop for CITs to be hosted by Austria in 1996.

---

8. Development of new products, recycling, markets and applications for forest products

Geneva, March 1995

The second meeting of the Team of specialists on this topic issued a report which describes legislation and its evolution in conjunction with the sector, recycling technical constraints and economic trends, new market outlets for small and low quality roundwood and consequences of recycling on forest, wood industries and the associated markets and prices. The report ends with propositions of recommendations for policy makers.

The Team, in conjunction with the Team of specialists on Wood and Energy, will organize a workshop on "Policy issues in timber markets and recycling and energy generation from wood" on 3-5 September 1996 in Hamburg, Germany.

---

9. Timber Committee/European Forestry Commission study tour in the United States on the hardwood resource and its utilization

At the invitation of the United States Department of Agriculture Forest Service, the American Hardwood Export Council (AHEC) and the United States hardwood lumber industry, a joint Timber Committee and European Forestry Commission study tour was held 7-14 May 1995 on the theme of "the Appalachian hardwood timber resources and hardwood lumber industry." The tour touched all aspects of the hardwood resource and its utilization: description of the wood and non-wood resources through visits to hardwood forests; review of forest management, harvesting and silvicultural techniques at National Forests; visits to manufacturing plants producing sawnwood and

furniture dimension; discussions of export marketing practices; the role of research institutions and universities; the role of trade associations in facilitating marketing; etc.

The participants included 44 people representing 14 countries in the ECE region plus Korea. The tour began in Lexington, Kentucky and travelled up through the Appalachian Mountains to New York State before ending in Pittsburgh, Pennsylvania.

10. Forest fires

ECE/FAO Forest Fire Statistics 1992-1994

The Joint ECE/FAO Working Party on Forest Economics and Statistics, has been collecting forest fire statistics since 1980. A meeting was held in 1995 among the different organizations active in this field, with the view to assess the demand for such information, coordinate and streamline the future collection of statistics avoiding duplication of work and reducing the reporting burden of countries. As a result of the meeting the 1996 survey will be carried out in close cooperation between ECE/FAO Geneva and the Commission of the European Communities.

The latest enquiry carried out in 1995 provides information on the number, area, causes and losses of fires in Europe, Belarus, the Russian Federation, Ukraine and North America.

International Forest Fire News (IFFN)

IFFN is issued twice a year and is intended to enhance the exchange of information on wildland fire management and related sciences. It provides information about fire related issues in various countries: fire management programmes, cooperation, recent and forthcoming meetings and publications. Short reports provided by government bodies or individual scientists and managers are given together with bibliographical sources and contact addresses. It also serves as news bulletin for IUFRO's Subject Group S1.09, Forest Fire Research. It is produced with the cooperation of the International Association of Wildland Fire, the International Global Atmospheric Chemistry (IGAC) Project (IGBP) and the International Boreal Forest Research Association. IFFN is also published in French thanks to the cooperation of Forestry Canada.

SUMMARY TABLE - TOTAL AREA OF FIRES (1000 ha)

	1990	1991	1992	1993	1994	1990-1994 average
Europe	700	580	447	483	738	590
of which, southern Europe [a]	687	573	397	471	727	571
Russian Federation	1670	1126	1143	1200	1156	1259
North America	3138	2681	2152	3799	2877	2930

[a] Albania, Croatia, Cyprus, France, Greece, Israel, Italy, Portugal, Slovenia, Spain, Turkey and Yugoslavia.

II. ACTIVITIES PLANNED FOR 1996 AND 1997

This section is intended to provide readers with information on the Committee's forthcoming activities. It is not a definitive programme, as additions or deletions sometimes have to be made at fairly short notice. Meetings are formally announced by the circulation of a provisional agenda at least three months before their scheduled date, and a press release is also issued.

Attendance at seminars, symposia and study tours organized by the Committee is open to experts in the subjects to be discussed, with permission of their Governments. Further information about all this activities is available on request from the secretariat.

The Timber Committee's annual session

The Timber Committee meets annually in Geneva: its 1996 session will be held in joint session with the FAO European Forestry Commission and the two bodies will celebrate their fiftieth anniversary. The meeting is provisionally scheduled from 23-27 September. The main items on the agenda will be: the policy implications of the European Timber Trends and Prospects Study (ETTS V), review of the follow-up to UNCED and the Helsinki Ministerial Conference on the Protection of Forests in Europe; preparations for the forest resource assessment 2000; review of recent developments and prospects in the coming year in the forest products markets; review of activities of its subsidiary bodies and of meetings held over the previous year under its auspices.

Statistics

The Committee will continue to publish its regular statistics in the *Timber Bulletin*, on forest products production and trade, trade flows of forest products, the monthly prices for forest products, and the results of the annual enquiry on forest fire.

Forest products markets

Other issues of the *Timber Bulletin* will contain the Committee's regular review and analyses of short-term developments in forest products markets. The annual forest products market review covers trends in the previous year and is published in July/August. The results of the Committee's discussions at its annual session, when it prepares forecasts for the current and forthcoming year, are issued in November.

Contents of the *Timber Bulletin* in 1996

The *Timber Bulletin* consists of 6 issues a year and is available on an annual subscription. For further information, those interested are invited to contact the United Nations Distribution and Sales Unit, Palais des Nations, 1211 Geneva 10, Switzerland (Fax No.: + 41 22 917 00 27).

The issues of the *Timber Bulletin*, Volume XLIX for 1996 will be as follows:

Issue:	Title:
ECE/TIM/BULL/49/1	Forest Products Prices, 1993-1995
ECE/TIM/BULL/49/2	Forest Products Statistics, 1991-1995
ECE/TIM/BULL/49/3	Forest Products Annual Market Review, 1995-1996
ECE/TIM/BULL/49/4	Forest Fire Statistics, 1992-1994
ECE/TIM/BULL/49/5	Forest Products Trade Flow Data, 1994-1995
ECE/TIM/BULL/49/6	Forest Products Markets in 1996 and Prospects for 1997

Forest technology management and training

The Joint FAO/ECE/ILO Committee and its Steering Committee meet in alternate years. The Joint Committee will hold its twenty-first session from 24-27 June 1996 in Sinaia, Romania, in conjunction with the seminar on environmentally sound forest roads and wood transport. The Steering Committee will hold its thirteenth session in 1997. The following seminars will be organized in 1996 under the auspices of the Joint Committee:

1996

Title:	**Seminar on environmentally sound forest roads and wood transport**
Date:	17-22 June
Location:	Sinaia, Romania
Objectives:	To encourage the exchange of information on latest developments in the technology and practice of forest road building and maintenance, with a view to transporting wood from the forest to the mill at low cost, while respecting the environment.
Target groups:	Government agencies, forest managers
Title:	**Seminar on forest, fire and global change**
Date:	5-10 August
Location:	Shushenskoye, Krasnoyarsk, Russian Federation
Objectives:	Better understanding of the role of natural and accidental fire in global ecosystems with special emphasis in the ECE region
Target groups:	Government agencies, fire managers, fire management experts
Title:	**Seminar on safety and health in forestry are feasible!**
Date:	7-11 October
Location:	Konolfingen, Switzerland
Objectives:	To assist governments in planning their national vocational training policies, in raising the efficiency of forest operations, in improving working practices with regard to safety and health, recommending safety standards in various operations, preventing occupational injuries and diseases, increasing work performance and forest workers' satisfaction in their jobs
Target groups:	Government agencies, forest workers' training institutions

---

Forest Economics and Statistics

The FAO/ECE Working Party on Forest Economics and Statistics meets every two years. It will hold its twenty-first session in Geneva in 1997. It will review the results of meetings since its 1995 session; the activities of teams of specialists; will evaluate the ETTS V process; will review preparations for the next enquiry on the forest resource of the temperate zones; and will adopt its programme of work for 1998-2003.

Assistance to countries in transition of central and eastern Europe

At its annual sessions the Committee reviews its programme of assistance to countries in transition on the basis of recommendations of the team of specialists, which will meet in March in Geneva, to ensure that it fulfils the expectations of this group of countries. The programme consists mainly in the organization of workshops, at which the following are scheduled in 1996:

- Workshop on institution building, framework conditions and infrastructure for sustainable development of the forestry sector under market economy conditions, Slovakia, late 1996, to be confirmed;

- Workshop on public relations for countries in transition, Austria, fall 1996, to be confirmed.

In addition, several country profiles on the countries in transition of central and eastern Europe will be published.

Certification of forest products

A team of specialists was established to collect and analyze information and issues on the application of certification schemes of the sources of forest products. The team presented an interim report to the Committee's last session. The report will be finalized and presented to the 1996 session. It will review certification activities in the ECE region, postulate potential scenarios regarding the effects of certification on forest management and forest products markets and offer some conclusions and recommendations.

Outlook for the supply and demand of non-wood goods and services

A study on the outlook for the supply and demand of the non-wood goods and services of the forest will be carried out, as a framework for national studies, as a basis for national policies, and to develop methodology in the field. It will attempt to assess the sustainability of the present practice with regard to non-wood goods and services. A team of specialists was established to prepare proposals on the scope and methods of the study. The team will also examine the economic and financial basis for sustainable supply of all goods and services of the forest, including topics such as the incorporation of environmental costs and benefits into market forces and mechanisms, the compensation of forest owners for the supply of non-wood goods and services, by traditional means, and by more innovative and market oriented mechanisms (e.g. user fees, management contracts, more result oriented payment systems).

Conversion factors

The results of the four-yearly enquiry on individual countries' conversion factors (raw material input/product output) for forest products will be published in 1996.

Wood--An environmentally friendly material

A workshop on this topic will be organized by Sweden in 1996, under the auspices of the Timber Committee. It will focus on the environmental, energy and recycling aspects associated with the use of wood compared to other construction materials. The whole production, consumption and recycling processes will be reviewed. Group work will lead to the workshop's conclusions and recommendations. A study tour will visit forests, factories and a wood-fueled power plant. Participants will visit Elmia Trade Fair which occurs simultaneously.

Title:	**Workshop on "Wood--An environmentally friendly material"**
Date:	15-17 April 1996
Location:	Jönköping, Sweden
Objectives:	To present and discuss environmental, energy and recycling advantages of the use of wood in construction, millwork, furniture, etc., in comparison to similar aspects of competing materials. To discuss prospects for international cooperation to promote the utilization of wood.
Target groups:	Government policy experts in the forestry, forest industries and environment sectors; and a limited number of industry representatives from each country.

Policy issues in timber markets and recycling and energy generation from wood

A workshop on this topic will be organized by the German Government in 1996. The teams of specialists on use of wood for energy and on recycling and new products are preparing this inter-sectoral policy workshop which will bring together experts from the energy and environment sectors, in addition to the forest and forest products sector.

Title:	**Workshop on "Policy issues in timber markets and recycling and energy generation from wood"**
Date:	3-5 September 1996
Location:	Hamburg, Germany
Objectives:	To present and discuss environmental, energy and recycling policy interactions with a multidisciplinary approach.
Target groups:	Government experts and policy makers in the energy, environment, forestry and forest industries sectors.

III. BIBLIOGRAPHICAL REFERENCES

Set out below are bibliographical references to those documents issued under the Committee's auspices in 1995 which may be of interest to experts in the forest and forest products sector.

Issues of the Timber Bulletin are available on subscription (see below). Unless otherwise indicated, other documents are available on request, free of charge from the secretariat, while stocks last. The documents are described under the same headings as the text of the *Yearbook*. Further information may be obtained from the ECE/FAO secretariat (address on page iv).

1. TIMBER COMMITTEE ACTIVITIES CONTRIBUTING TO THE FOLLOW-UP OF UNCED AND THE HELSINKI MINISTERIAL CONFERENCE ON THE PROTECTION OF FORESTS IN EUROPE

Report of Timber Committee's fifty-third session (ECE/TIM/85)
Report to the Timber Committee (TIM/R.266)

2. FOREST PRODUCTS MARKETS

The contents of the *TIMBER BULLETIN* in 1995, Vol. XLVIII, were as follows:

Issue:	Title:
ECE/TIM/BULL/48/1	Forest Products Prices, 1992-1994
ECE/TIM/BULL/48/2	Forest Products Statistics, 1990-1994
ECE/TIM/BULL/48/3	Forest Products Annual Market Review, 1994-1995
ECE/TIM/BULL/48/4	Forest Fire Statistics, 1992-1994
ECE/TIM/BULL/48/5	Forest Products Trade Flow Data, 1990-1994
ECE/TIM/BULL/48/6	Forest Products Markets in 1995 and Prospects for 1996

RELEVANT FAO STATISTICAL PUBLICATIONS

(available from: Distribution and Sales Section, Food and Agriculture Organization of the United Nations, Via delle Terme di Caracalla, I-00100 Rome)

FAO Yearbook of Forest Products 1993

3. ASSISTANCE TO COUNTRIES IN TRANSITION OF CENTRAL AND EASTERN EUROPE

Report to the Committee's fifty-third session (TIM/R.263).

Reports of the workshops on:

The development of marketing of sawnwood products in countries in transition to market economies. Sopron, Hungary, 6-10 November 1994. The proceedings were published by the host country.

Forest seed collection, treatment and storage, 4-8 June 1995, Opocno, Czech Republic. The proceedings are being prepared by the host country.

The development of marketing of sawnwood products in countries in transition to market economies. Tartu, Estonia, 9-13 October 1995. The proceedings are being prepared by the host country.

Forest and forest products country profiles

Forest and forest products country profiles have published for the following countries in transition:

former Czech and Slovak Federal Republic	ECE/TIM/64
Romania	ECE/TIM/65
Hungary	ECE/TIM/66
Poland	ECE/TIM/67
Albania	ECE/TIM/73
Estonia	ECE/TIM/74
Published in 1994:	
Bulgaria	ECE/TIM/SP/1
Slovenia	ECE/TIM/SP/2
Lithuania	ECE/TIM/SP/3
Ukraine	ECE/TIM/SP/4
Belarus	ECE/TIM/SP/5
Published in 1995:	
Republic of Armenia	ECE/TIM/SP/8

4. FIFTH EUROPEAN TIMBER TRENDS AND PROSPECTS STUDY (ETTS V)

ETTS V will be published in spring 1996 as a Study Paper.

5. MULTIPLE USE FORESTRY

Reports on the seminar on exploring multiple use and ecosystem management: from policy to operational practice, Prince George, B.C., Canada, 9-15 September 1995, (TIM/EFC/WP.1/SEM.42/2). The proceedings are being prepared by the host country.

6. FOREST ECONOMICS AND STATISTICS

Report of the twentieth session of the Joint FAO/ECE Working Party on Forest Economics and Statistics, Geneva, 20-22 June 1995, (TIM/EFC/WP.2/25)

7. PUBLIC RELATIONS IN FORESTRY

Report of the meeting of the joint FAO/ECE team of public relations specialists in the forest and forest industries sector, Beaupré, Québec, Canada, (TIM/R.256 and Add.1)

8. DEVELOPMENT OF NEW PRODUCTS, RECYCLING, MARKETS AND APPLICATIONS FOR FOREST PRODUCTS

Report of the meeting of the team of specialists on development of new products, recycling, markets and applications for forest products, Geneva, 14-15 March 1995, (TIM/R.255 and Add.1)

9. FOREST FIRES

Report of the inter-agency meeting on coordination, collection and dissemination of forest fire statistics, Geneva, 24 March 1995, (TIM/EFC/WP.2/R.146)

Forest Fire Statistics, 1992-1994, ECE/TIM/BULL/48/3

International Forest Fire News, (N° 12, January 1994)
International Forest Fire News, (N° 13, July 1994)

IV. LIST OF MEETINGS IN 1995 AND 1996

Note: The meetings are sub-divided into two categories: meetings marked (A) are open to delegates or approved representatives from all member countries of ECE as well as from other member countries of the United Nations and organizations accredited to ECE (or to FAO and ILO, in the case of meetings co-sponsored by them), while meetings marked (B) are those restricted to the countries or individuals nominated by their countries to take part in the activity concerned, e.g., a team of specialists.

1996

Date	Location	Title
13-15 February	Évora (Portugal)	Team of specialists on certification of forest products (B)
5-8 March	Geneva	Team of specialists on countries in transition (B)
15-17 April	Jönköping (Sweden)	Workshop: "Wood--An environmentally friendly material" (A)
15-17 April	Geneva	Second meeting of the team of specialists on the temperate and boreal forest resource assessment (B)
April (dates to be confirmed)	Geneva	Joint meeting of the ECE Timber Committee office holders and the Executive Committee of the FAO European Forestry Commission (B)
10-13 June	Austria	Team of Public Relations specialists (B)
10-14 June (dates to be confirmed)	Kotka (Finland)	Intergovernmental consultation of forest resource assessment, Kotka III (B)
17-21 June	Sinaia (Romania)	Seminar on environmentally sound forest roads and wood transport (A)
24-27 June	Sinaia (Romania)	Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, 22nd session (A)
5-10 August	Krasnoyarsk, (Russian Federation)	Seminar on forest fire and global change (A)
3-5 September	Hamburg (Germany)	Workshop on policy issues in timber markets, recycling and energy generation from wood (A)
23-27 September	Geneva	ECE TIMBER COMMITTEE, 54th session, in joint session with the FAO European Forestry Commission (A)

7-11 October	Konolfingen (Switzerland)	Seminar: "Safety and health in forestry are feasible!" (A)
Undecided	Austria	Workshop on public relations for countries in transition (B)
Undecided	Slovakia	Workshop on institution building, framework conditions and policy infrastructure for sustainable development of the forestry sector under market economy conditions (B)

1997

Date	Location	Title
April (dates to be confirmed)	Geneva	Meeting of the Timber Committee office holders (B)
4-5 June	Uppsala (Sweden)	Workshop on multiple use forestry (A)
June (dates to be confirmed)	Geneva	Joint FAO/ECE Working Party on Forest Economics and Statistics, 21st session (A)
September (dates to be confirmed)	Italy (to be confirmed)	Seminar on harvesting of wood and non-wood forest products in the Mediterranean region (jointly organized by Italy and FAO, in collaboration with the FAO/ECE/ILO Joint Committee) (A)
October (dates to be confirmed)	Geneva	ECE TIMBER COMMITTEE, 55th session (A)
Undecided	Undecided	*Ad hoc* meeting on temperate and boreal forest resource assessment (A)

SOME FACTS ABOUT THE TIMBER COMMITTEE

The Timber Committee is a principal subsidiary body of the ECE (UN Economic Commission for Europe) based in Geneva. It constitutes a forum for cooperation and consultation between member countries on forestry, forest industry and forest product matters. All countries of Europe; the former USSR; United States of America, Canada and Israel are members of the ECE and participate in its work.

The ECE Timber Committee shall, within the context of sustainable development, provide member countries with the information and services needed for policy- and decision-making regarding their forest and forest industry sector ("the sector"), including the trade and use of forest products and, when appropriate, formulate recommendations addressed to member Governments and interested organizations. To this end, it shall:

1. With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those offering possibilities for the facilitation of international trade and for enhancing the protection of the environment;

2. In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability;

3. Provide the framework for cooperation e.g. by organizing seminars, workshops and *ad hoc* meetings and setting up time-limited *ad hoc* groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries that is needed for the development and implementation of policies leading to the sustainable development of the sector and to the protection of the environment in their respective countries;

4. Carry out tasks identified by the UN-ECE or the Timber Committee as being of priority, including the facilitation of subregional cooperation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic point of view;

5. It should also keep under review its structure and priorities and cooperate with other international and intergovernmental organizations active in the sector, and in particular with the FAO (Food and Agriculture Organization of the United Nations) and its European Forestry Commission and with the ILO (International Labour Office), in order to ensure complimentarily and to avoid duplication, thereby optimizing the use of resources.

More information about the Committee's work may be obtained by writing to:

Timber Section
UN-ECE Trade Division
Palais des Nations
CH-1211 Geneva 10, Switzerland
Fax: 41 22 917-0041

UN-ECE/FAO Publications

*Timber Bulletin Volume XLVIII (1995) ECE/TIM/BULL/48/...
*Timber Bulletin Volume XLIX (1996) ECE/TIM/BULL/49/...
(Six issues per year)

1. Forest Products Prices
2. Forest Products Statistics
3. Forest Products Annual Market Review
4. Forest Fire Statistics
5. Forest Products Trade Flow Data
6. Forest Products Markets in (current year) and Prospects for (forthcoming year)

***UN-ECE/FAO Timber and Forest Study Papers**

Forest and Forest Products Country Profile: Belarus ECE/TIM/SP/5
(Country profiles also exist on Albania, Bulgaria, former Czech and Slovak Federal Republic, Estonia, Hungary, Lithuania, Poland, Romania, Slovenia and Ukraine)
Forest resource information of some newly constituted countries--Supplement to the UN-ECE/FAO 1990 forest resource assessment of the temperate zones ECE/TIM/SP/6
Survey of the Structure of the Sawmilling Industry in the ECE/FAO region ECE/TIM/SP/7
Forest and Forest Products Country Profile: Republic of Armenia ECE/TIM/SP/8
North American Timber Trends Study ECE/TIM/SP/9

UN-ECE/FAO Timber and Forest Discussion Papers (original language only)

Castrén and Simula, "Productivity in Finnish Forestry in 1964-1989" ECE/TIM/DP/1
Wibe, "Non-wood benefits in forestry, survey of valuation studies" ECE/TIM/DP/2
Dykstra, "Information systems in forestry: a brief overview" ECE/TIM/DP/3
Pajuoja (ETTS V working paper) "The outlook for the European forest resources and roundwood supply" ECE/TIM/DP/4
Brooks, Baudin and Schwarzbauer (ETTS V Working Paper) "Modeling forest products demand, supply and trade" ECE/TIM/DP/5
Baudin and Brooks (ETTS V Working Paper) "Projections of forest products demand, supply and trade in ETTS V" ECE/TIM/DP/6

ETTS V Working Papers: (to be issued in 1996)

- Peck and Descargues, "The policy context for the development of the forest and forest industries sector in Europe"
- Eronen, "Forest resources and consumption of forest products in countries in transition"
- Issartel and Vikinge, "Long-term trends in forest products prices"
- Country scenarios for ETTS V

UN-ECE/FAO Timber and Forest Seminar and Workshop Proceedings

Clothing and safety equipment in forestry, Finland, 1994
Development of marketing of sawnwood products in countries in transition, Hungary, 1994

UN-ECE/FAO Timber and Forest Information Series

The UN-ECE Timber Committee Yearbook 1996 ECE/TIM/INF/3
Brochures about the ECE Timber Committee, the FAO European Forestry Commission, the Joint FAO/ECE Working Party on Forest Economics and Statistics and the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training

Instructions for ordering publications

Single copies of publications may be requested through:
Timber Section
UN-ECE Trade Division
Palais des Nations
CH-1211 Geneva 10, Switzerland
Fax: 41 22 917 0041

* Sales documents and subscriptions are available through:
Distribution and Sales Unit
United Nations
Palais des Nations
CH-1211 Geneva 10, Switzerland
Fax: 41 22 917 0027

كيفية الحصول على منشورات الامم المتحدة

يمكن الحصول على منشورات الامم المتحدة من المكتبات ودور التوزيع في جميع انحاء العالم . استعلم عنها من المكتبة التي تتعامل معها أو اكتب الى : الامم المتحدة ،قسم البيع في نيويورك او في جنيف .

如何购取联合国出版物

联合国出版物在全世界各地的书店和经售处均有发售。请向书店询问或写信到纽约或日内瓦的联合国销售组。

HOW TO OBTAIN UNITED NATIONS PUBLICATIONS

United Nations publications may be obtained from bookstores and distributors throughout the world. Consult your bookstore or write to: United Nations, Sales Section, New York or Geneva.

COMMENT SE PROCURER LES PUBLICATIONS DES NATIONS UNIES

Les publications des Nations Unies sont en vente dans les librairies et les agences dépositaires du monde entier. Informez-vous auprès de votre libraire ou adressez-vous à : Nations Unies, Section des ventes, New York ou Genève.

КАК ПОЛУЧИТЬ ИЗДАНИЯ ОРГАНИЗАЦИИ ОБЪЕДИНЕННЫХ НАЦИЙ

Издания Организации Объединенных Наций можно купить в книжных магазинах и агентствах во всех районах мира. Наводите справки об изданиях в вашем книжном магазине или пишите по адресу: Организация Объединенных Наций, Секция по продаже изданий, Нью-Йорк или Женева.

COMO CONSEGUIR PUBLICACIONES DE LAS NACIONES UNIDAS

Las publicaciones de las Naciones Unidas están en venta en librerías y casas distribuidoras en todas partes del mundo. Consulte a su librero o diríjase a: Naciones Unidas, Sección de Ventas, Nueva York o Ginebra.

Printed at United Nations, Geneva
GE.96-20238–February 1996–2,630

United Nations publication